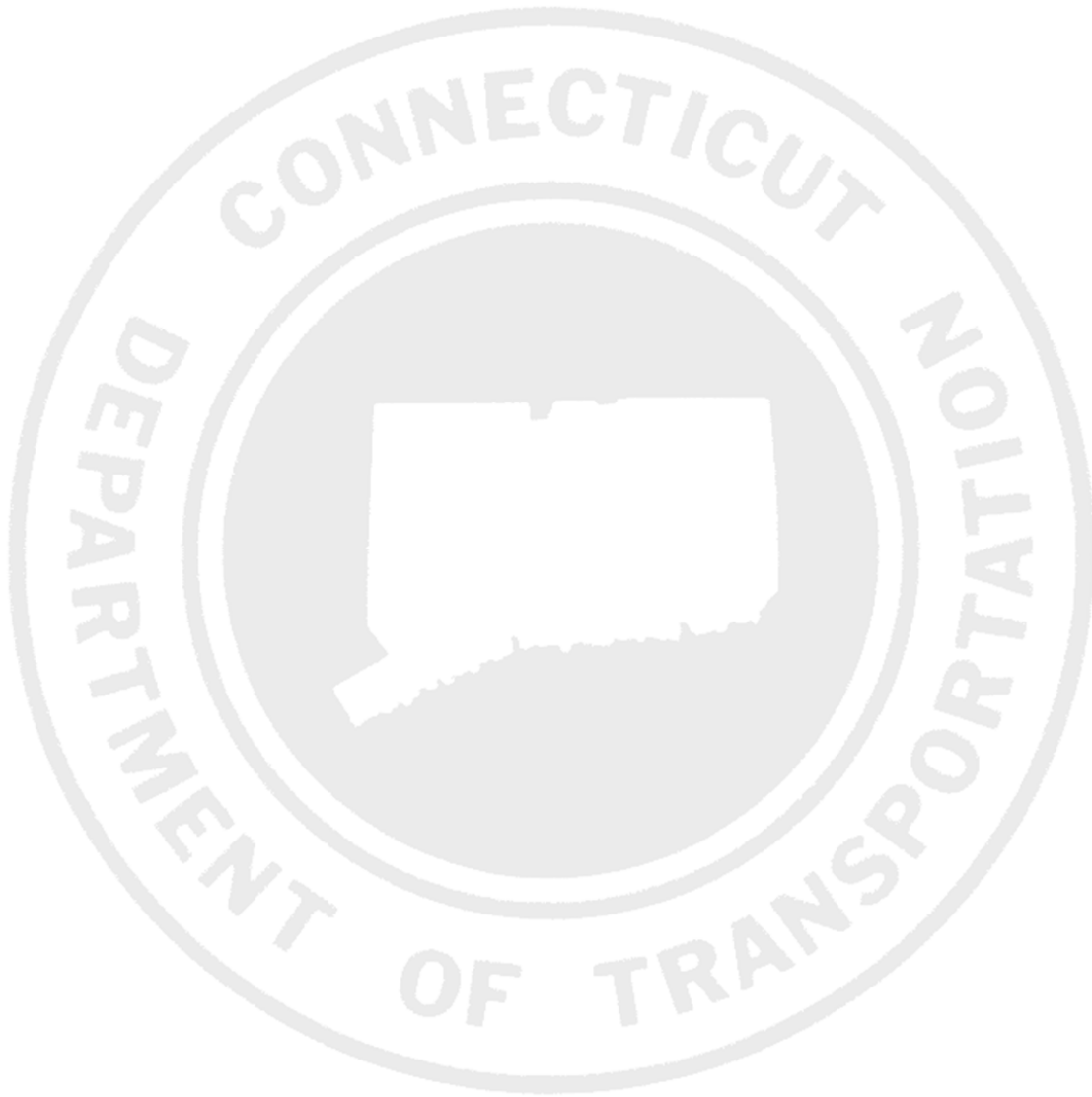


# Projectwise – Searching



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## Section 1 Introduction

Searching in Projectwise is a very powerful and useful tool, allowing users to find projects, folders, and documents easily with limited information. There are two ways to search in Projectwise: Quick Searches and Advanced Searches. In addition Projectwise has the ability to save searches for future use. This document will go over how to search and create saved searches in Projectwise.

## Section 2 Searching

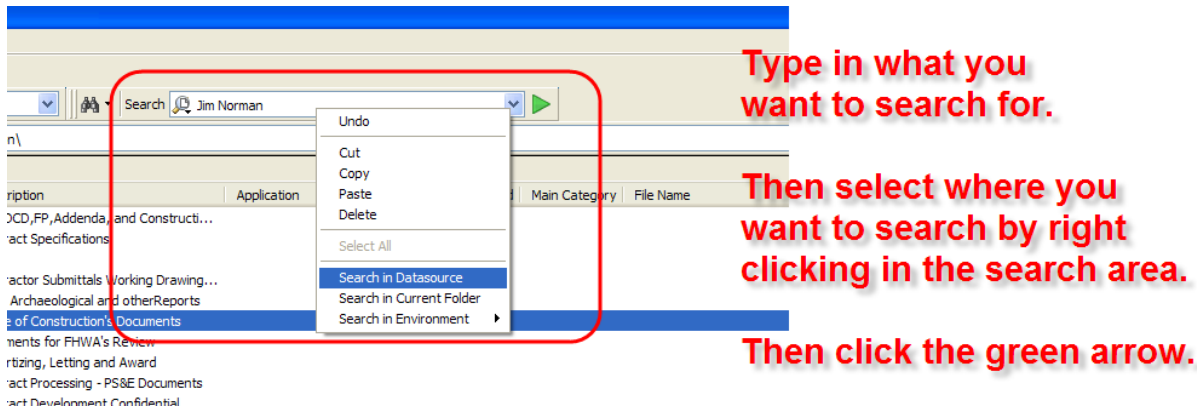
### 2.1 Quick Search

Quick Search lets users search for documents, folders, and projects, simply by typing the text they want to search for and click start search. Quick searches are not case sensitive, and the Quick Search field stores the most recently used searches for quick access.

By default, quick searches are set to search in the currently selected folder or project and its subfolders, however you can change where you want to search by right-clicking in the Search toolbar and select an option: Search in Datasource or Search in Current Folder. The option to *Search in Environment* should not be selected.

#### Procedure for Quick searches

1. Enter what you want to search for and then click the green arrow.



Wild cards can be used to help with searching when the user does not know all the information about a document. For example if you were searching for Microstation files but you did not know the title, you could search for all microstation files by typing \*.dgn. This search will find all documents that had .dgn in them.

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Wild cards can be entered in the search field by using the following:

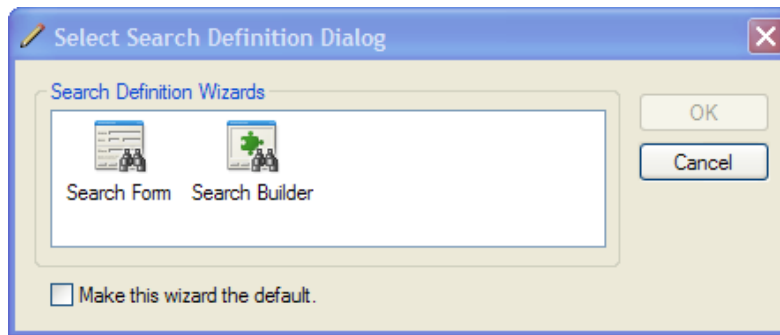
Wild cards	Comments	Examples
* or %	The wild cards * and % can be used to replace multiple characters in a text string. To use, place either the * or % character in front of, at the end of, or both in front of and at the end of your text string in the Quick Search field.	<p>*.dgn finds all documents that have the extension DGN.</p> <p>overview.* finds all documents that have the file name OVERVIEW, regardless of file type (overview.doc, overview.dgn, overview.pdf, and so on).</p> <p>plan* finds all documents, folders and projects that begin with PLAN (plan.dgn, planet.dgn, plant.dgn, and so on).</p> <p>*plan finds all documents, folders and projects that end with PLAN (masterplan.dgn, planet.dgn, plant.dgn, and so on).</p>
? or _	The wildcards ? and _ can be used to replace any one character in a text string.	<p>Entering over?ook could produce the following search results, for documents, folders and projects that have these names:</p> <p>overbook</p> <p>overcook</p> <p>overlook</p> <p>overtook</p>

## 2.2 Advanced Searches

There are two options when performing an advanced search, the Search Form or Search Builder.

The search form should be used when searching for documents and the search builder should be used when searching for projects, project properties or folders.

To do an advanced search right click on a folder to search and select *advanced search*. The advanced search dialog will pop up and the user can select Search Form or Search Builder.



### 2.2.1 Search Form

The search form allows users to search on document properties, document attributes, and file properties. To search users will need to populate one or more of the fields in one or more of the tabs shown below. The following tabs will be the most used: General tab, Attributes tab, File Properties, and Full text tabs. The wild cards in the Quick search section will work in the search form.

- Below is the General tab, type in one or more fields and then select apply to search
- You can change the folder to search in the folder section below.

The screenshot shows the 'Search by Form - CTDOT' window. It has several tabs: General, Attributes, More Attributes, File Properties, Full Text, Geospatial, and LRS Textual. The 'General' tab is active. It is divided into three sections: Document, File, and Folder. The Document section has fields for Name, Description, Version, Sequence, Application, Status, Status set by, Created By, Updated By, Workflow, State, Department, Out to, and three On: fields. The File section has fields for File Name, File Size, File Updated By, Storage, On, and Conflicts. The Folder section has a 'Look in' field with the path '01 - CTDOT Projects\0063-0670\240\_Contract\_Development', a 'Change...' button, a checked 'Include subfolders' checkbox, Name and Description fields, an 'Environment Name' field with the value 'CTDOT\_Design\_Envir' and a 'Change...' button, and an unchecked 'Find in this Environment only' checkbox. At the bottom, there are buttons for 'Look For', 'Add OR Group', 'Clear', 'Saved Search', 'OK', 'Cancel', 'Apply', and a checkbox for 'Show results in new window'.

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- Below is the Attribute tab, type in one or more fields and then select apply to search

**Search by Form - CTDOT**

General | **Attributes** | More Attributes | File Properties | Full Text | Geospatial | LRS Textual

Discipline  
[Dropdown]

Main Category [Dropdown]      Main Category Description [Text Box]

Sub Category [Dropdown]      Sub Category Description [Text Box]

Project Number(s) [Text Box]

Label (User Defined) [Dropdown]

Long Description [Text Box]

CT Code (Auto Fill In) [Text Box]

Look For    Add OR Group    Clear    Saved Search ▾

OK    Cancel    Apply    ☐ Show results in new window

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- Below is the File Properties tab, type in one or more fields and then select apply to search

The screenshot shows a software window titled "Search by Form - CTDOT". It has a tabbed interface with the following tabs: General, Attributes, More Attributes, File Properties (selected), Full Text, Geospatial, and LRS Textual. The "File Properties" tab is active and displays two expandable sections: "Summary Information" and "Document Summary Information".

**Summary Information**

Title	
Subject	
Keywords	
Template	
Category	
Pages	
Word Count	
Character Count	
Comments	
Author	
Last Author	
Revision Number	
Application Name	
Date Created	
Date Last Saved	
Last Printed	
Edit Time	
Security	

**Document Summary Information**

Category	
Page Count	
Character Count	

At the bottom of the dialog, there are buttons for "Look For", "Add OR Group", "Clear", and "Saved Search". Below these are "OK", "Cancel", and "Apply" buttons. A checkbox labeled "Show results in new window" is also present.



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- Below is the full text tab, type in a word or phrase and then select apply. This search will return any documents in the folder that have this word or phrase in the text of the document.

The screenshot shows a software window titled "Search by Form - CTDOT". It has several tabs: "General", "Attributes", "More Attributes", "File Properties", "Full Text" (which is selected), "Geospatial", and "LRS Textual".

Inside the "Full Text" tab, there is a section with the following controls:

- "Look for:" followed by a text input field containing the word "Guiderail".
- "Look inside:" followed by a dropdown menu currently set to "File Contents".
- "Return documents:" followed by a dropdown menu currently set to "Including exact phrase".

Below these controls is a section titled "Searching notes" with the following text:

Full text search criteria are applied to the whole search, and you cannot define a separate full text search criterion for a single 'OR Group'.

When both full text search criterion and standard search criteria are defined, the results include the documents that match both the standard search criteria in at least one of the specified 'OR Groups' and the common full text search criterion.

At the bottom of the dialog, there is a row of buttons: "Look For", "Add OR Group", "Clear", and "Saved Search" (with a dropdown arrow). Below this row are three buttons: "OK", "Cancel", and "Apply". To the right of the "Apply" button is a checkbox labeled "Show results in new window".

### 2.2.2 Search Builder

The search builder has the same functionality as the search form with the additional capability to search on project information and project types. Since each project has a set of project properties associated with it, these properties can be searched on. Below is an example of when the search builder would be used is if the user wanted to search for all projects on Route 95 or for all bridges that had a superstructure rating of 5 or less.

The following gives the steps for using the search builder:

1. Right click on the folder you wish to search in and select *advanced search* and select *search builder*.
2. Select what you want to search for documents or projects and folders as shown below.

Define Search - <new search>

Search

Specify what are you looking for and the view for search results

Look for: Documents View: <default>

Find documents: Projects and Folders

Document is in folder '01 - CTDOT Projects' or in any subfolder

OR Group (1)

Environment attribute labels from: CT\_Doc\_Xfer

Define criteria

Criterion Type: Property: Attribute:

Value: Add Criteria Add OR Group

Saved Search OK Cancel Apply

3. Define the criteria type as shown below:

Define Search - <new search>

Search

Specify what are you looking for and the view for search results

Look for: Projects and Folders View: <default>

Find projects and folders that match these criteria

Project or Folder is beneath the Folder '01 - CTDOT Projects' including subfolders

OR Group (1)

Define criteria

Criterion Type: Property: Attribute:

Geospatial  
General Properties  
Project Properties  
Project Type  
LRS Textual

Add Criteria

Add OR Group

Saved Search

OK Cancel Apply

4. Below Project Properties was selected so now a Project type needs to be selected.

Define Search - <new search>

Search

Specify what are you looking for and the view for search results

Look for: Projects and Folders View: <default>

Find projects and folders that match these criteria

Project or Folder is beneath the Folder '01 - CTDOT Projects' including subfolders

OR Group (1)

Define criteria

Criterion Type: Project Properties

Type: CTDOT Bridge Inspection  
CTDOT Bridge Inspection  
CTDOT Intersection Number  
CTDOT Rail Bridge  
CTDOT Research Projects  
CTDOT Transportation Project

Property: Condition\_ApproachRoadw...

Add Criteria

Add OR Group

Saved Search

OK Cancel Apply

Selecting **CTDOT Transportation Project** shall be selected when searching for active and legacy projects.

Selecting **CTDOT Bridge Inspection** shall be selected when searching for bridge files.

Selecting **CTDOT Intersection Number** shall be selected when searching for signal projects.

Selecting **CTDOT Rail Bridge** shall be selected when searching for rail bridge files.

Selecting **CTDOT Research Projects** shall be selected when searching for research projects.

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5. If CTDOT Transportation Project is selected, different properties can be selected to be searched on i.e. route number, town, project manager, FDP date. Select the property to search on below.

Define Search - <new search>

Search

Specify what are you looking for and the view for search results

Look for: Projects and Folders View: <default>

Find projects and folders that match these criteria

Project or Folder is beneath the Folder '01 - CTDOT Projects' including subfolders

OR Group (1)

Define criteria

Criterion Type: Project Properties Type: CTDOT Transportation Project

Value:

Property:

- ASSETS - Routes
- ASSETS - Signal System Nos
- ASSETS - Towns
- Construction - As Built Recor
- Construction - Completed D
- Construction - Contractor
- Construction - District
- Construction - Estimated CC
- Construction - Percent Comp
- Construction - Project Inspe
- Construction - Project Mana
- Design - ADV (Core Constr A
- Design - Consultant Enginee
- Design - DCD (Core Constr E
- Design - Digitally Signed
- Design - FDP (Core Constr F
- Design - Percent Completed
- Design - Primary Designer
- Design - Project Engineer
- Design - Project Manager
- Design - ROW AUTH
- Financial - Construction Cost
- FINANCIAL - Final Cost
- Financial - PE Cost Estimate
- GENERAL - CTDOT Improver
- GENERAL - FHWA Proj Over:
- GENERAL - General Descripti
- GENERAL - Program Number
- GENERAL - Project Current F
- GENERAL - Project Number(s)

Note: The property list will change with each project type.

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- Once a property is selected, type in a value to search on and select **Add criteria**. Below is an example to search for route 95. The syntax for a route includes four digits so 0095 was entered, but if \*95 was entered the search would work as well. The wild cards shown in the quick search section will work in the area.

Define Search - <new search>

Search

Specify what are you looking for and the view for search results

Look for: Projects and Folders View: <default>

Find projects and folders that match these criteria

Project or Folder is beneath the Folder '01 - CTDOT Projects' including subfolders

OR Group (1)

Define criteria

Criterion Type: Project Properties Type: CTDOT Transportation Project Property: ASSETS - Routes

Value: 0095

Add Criteria

Add OR Group

Saved Search

OK Cancel Apply

Note: You can search on more than one criterion by simply adding them to the search. Before you move on to step 7.

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7. Finally to search click apply.

Define Search - <new search>

Search

Specify what are you looking for and the view for search results

Look for: Projects and Folders View: <default>

Find projects and folders that match these criteria

Project property "CTDOT Transportation Project", "ASSETS - Routes" is '0095'

Project or Folder is beneath the Folder '02 - CTDOT Bridge Files' including subfolders

OR Group (1)

Select Apply to search

Define criteria

Criterion Type: Project Properties Type: CTDOT Transportation Project Property: ASSETS - Bridge Numbers

Value:

Add Criteria

Add OR Group

OK Cancel Apply

8. Click OK in the search builder to exit.

## 2.3 Saved Searches

For each project in Projectwise there are two types of saved searches: Global and Personal Searches. Global searches are available to all users while personal searches are just available to the person created. The AEC applications group has the ability to create Global searches and all users can create personal searches. Saved searches are located for each project as shown below: When a saved search is clicked on the applicable documents will be returned.

The screenshot displays the Projectwise interface. On the left, a project tree is visible with the project ID '0170-2296' circled in red. A red arrow points from the text 'Find Project' to this circled ID. Below the project tree, the 'Saved Searches' section is expanded, showing a list of global and personal searches. A red box highlights this section, and a red arrow points from the text 'Expand Saved Searches' to it. To the right of the search list, a table of project properties is visible. A red arrow points from the text 'You will see global and personal saved searches. Expand them and the searches will be shown' to the search list.

**Find Project**

**Expand Saved Searches**

**You will see global and personal saved searches. Expand them and the searches will be shown**

Project Properties	Fol
Home Folder Prop	
Folder Name	
Folder Description	
Environment Name	
Environment Descrip	
Workspace Profile N	
Workspace Profile D	
Storage	
Owner	
Home Folder Stat	
Created By	
Creation Time	
Updated By	
Update Time	
Workflow	
State	
Document Count	
Disk Usage	
Parent Folder	



### 2.3.1 *Creating Saved Searches*

Saved searches are created in the search form or search builder. The example below is for use with the Search form but the workflow is the same.

1. Once a search is created click on *Saved Search* in the bottom right hand corner (bottom left for search builder) and select *Save As*.

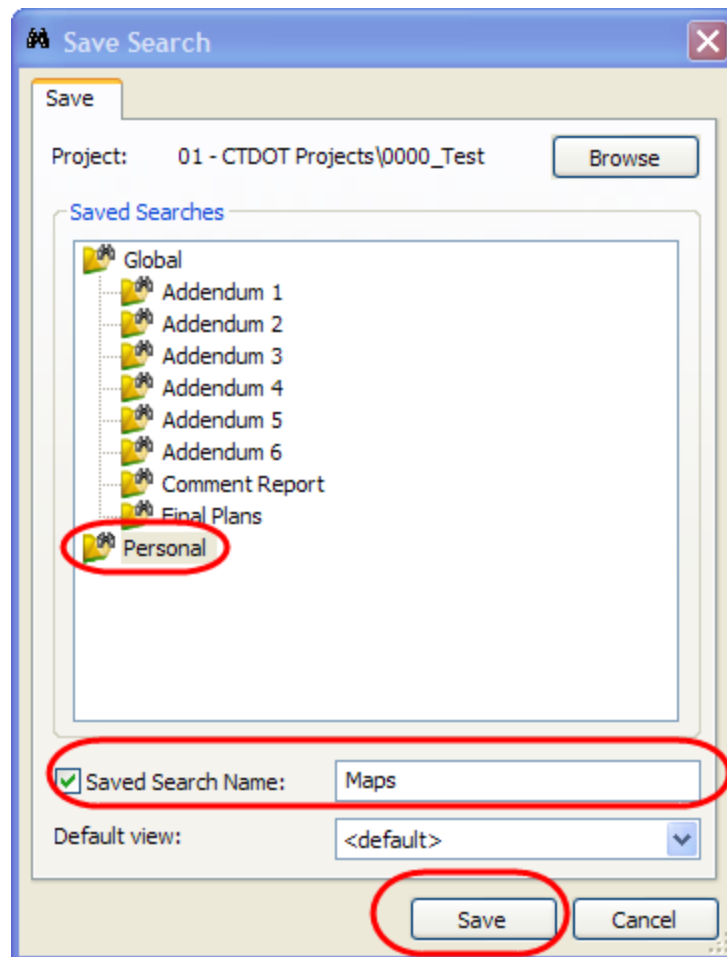
The screenshot shows the 'Search by Form - CTDOT' window. The 'Attributes' tab is active. The form includes the following fields:

- Discipline: A dropdown menu.
- Main Category: A dropdown menu.
- Main Category Description: A text input field.
- Sub Category: A dropdown menu.
- Sub Category Description: A text input field.
- Project Number(s): A text input field.
- Label (User Defined): A dropdown menu.
- Long Description: A large text input area.
- CT Code (Auto Fill In): A text input field.

At the bottom of the window, there are buttons for 'Look For', 'Add OR Group', 'Clear', 'OK', 'Cancel', 'Apply', and a checkbox for 'Show results in new window'. A 'Saved Search' dropdown menu is located in the bottom right corner, with the 'Save As' option highlighted by a red circle.

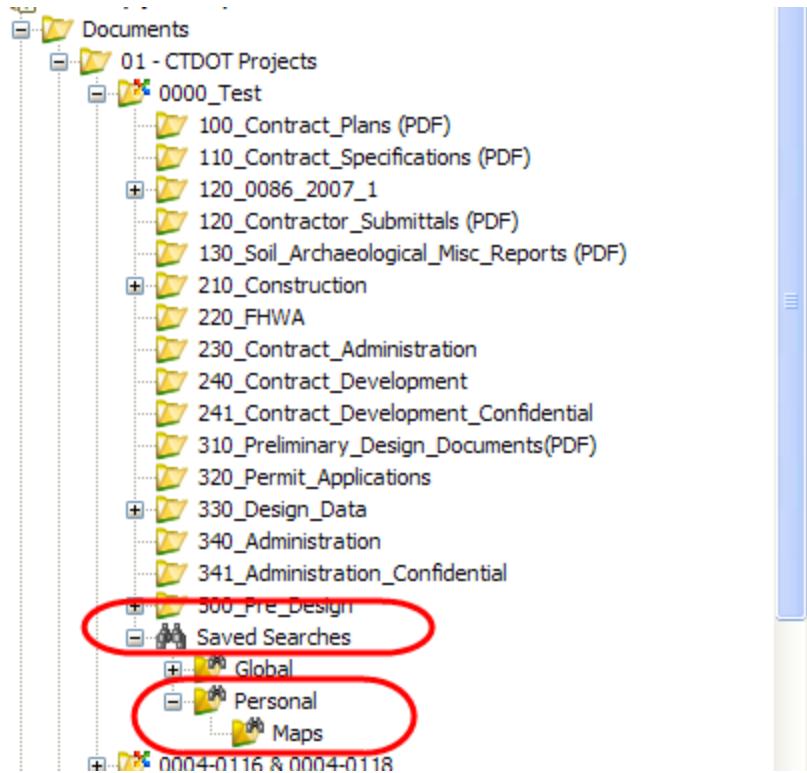
## Connecticut Department of Transportation Projectwise – Searching

2. Then click on personal and type in a saved search name. Then click save.



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3. Now in the saved search area of the project you will see the saved search.



If users feel their saved search could benefit others AEC applications can move it to the Global search area.

## 2.4 General Notes about Searches

1. All documents, folders, and/or projects that match your search criteria are returned, without regard to their hierarchy in the datasource, and listed in the search results list. These are the actual items, not just links to them, so be careful not to accidentally delete something from the search results list.
2. Documents, folders and/or projects that match your search criteria, but to which you do not have access, will not appear in the search results list.